FIRST INSURANCE
OF CANADA — FUNDING
A WINTRUST COMPANY

FirstInSite Enhanced

Quotes

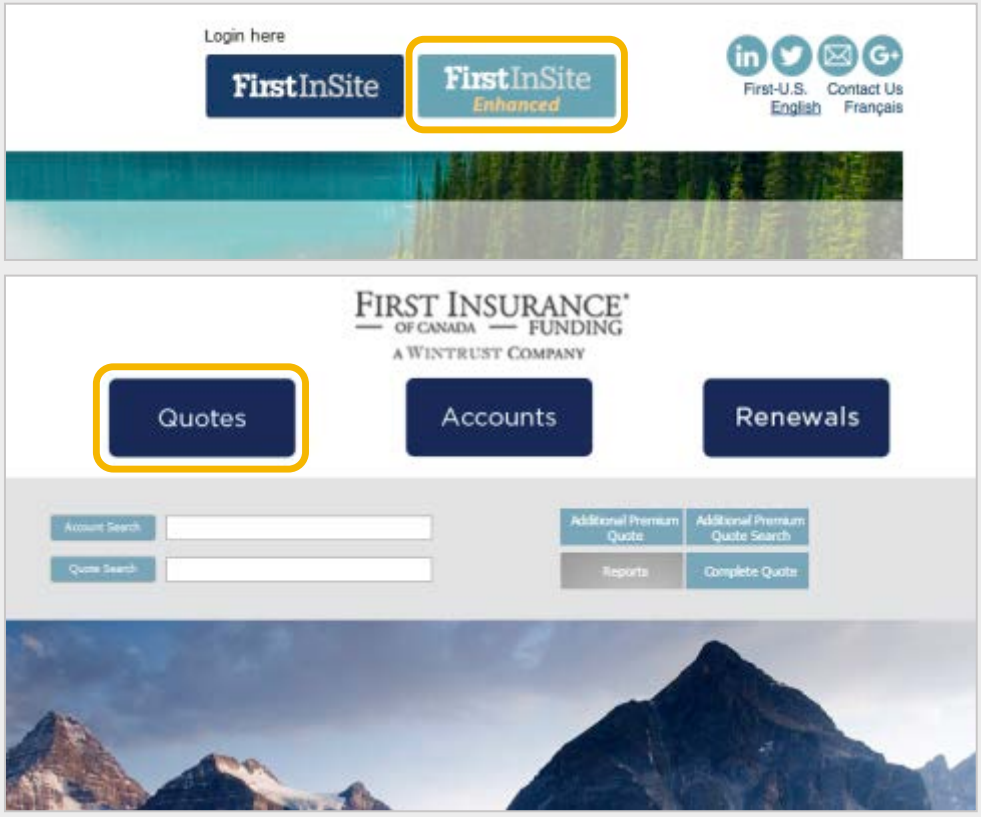
Quotes

Topics covered in this guide:

1. Creating a Quote
2. Quote – Adding Policy Details
3. eSignature with DocuSign
4. Editing a Quote
5. Tips

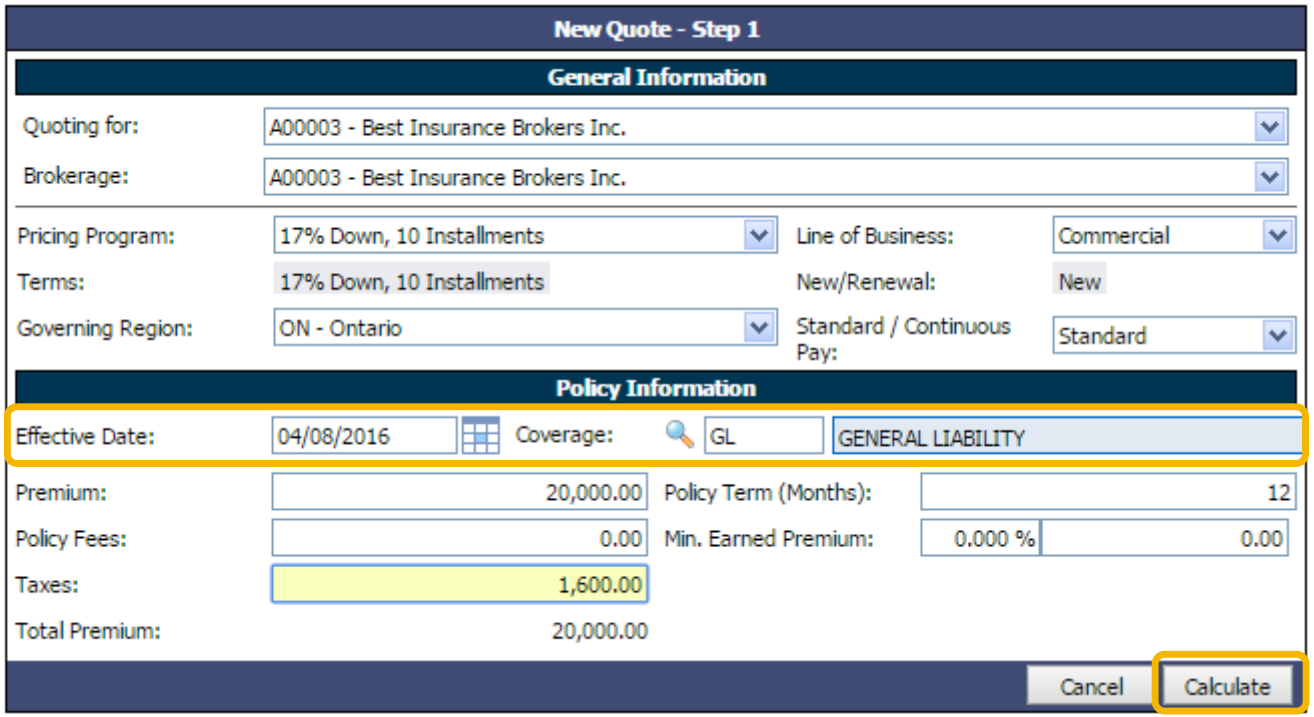
Login

- Click on the **First InSite Enhanced login button**
  firstinsurancefunding.ca
- Login with your user name (email address) and temporary password provided in your welcome email
- Select **Quotes**

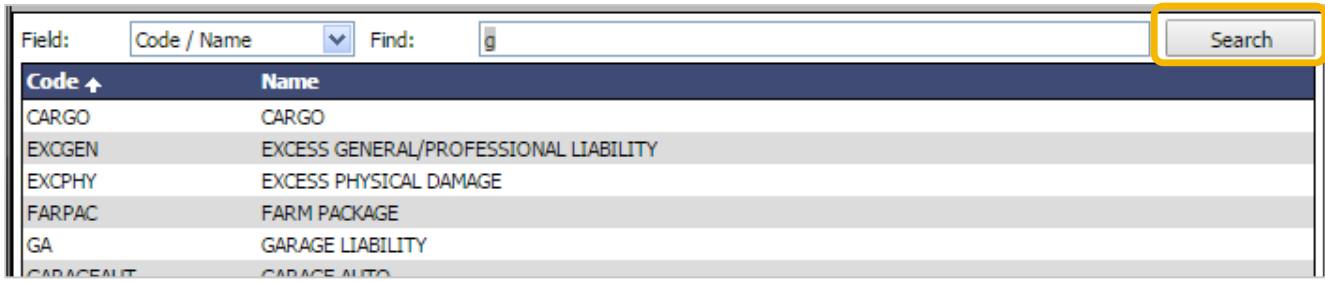


Creating a Quote

- Select pricing Program
- Enter effective date and coverage type
- Enter premium information and click **Calculate**



TIP: Click the search button to reveal a list of coverage types to choose from

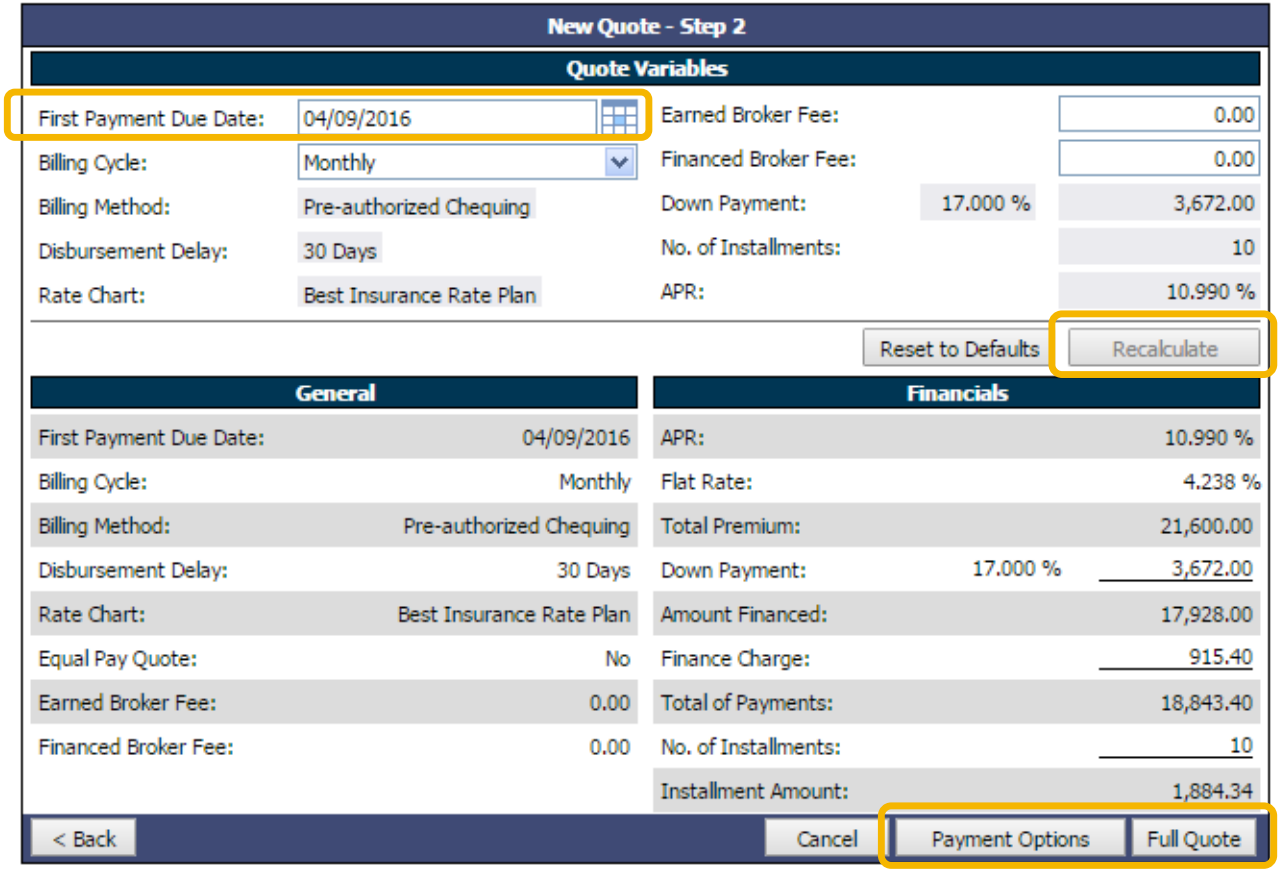


- Select first payment due date
- Enter any applicable broker fees and click **Recalculate**
- Review financial info and choose:

a) **Full Quote** to complete policy information

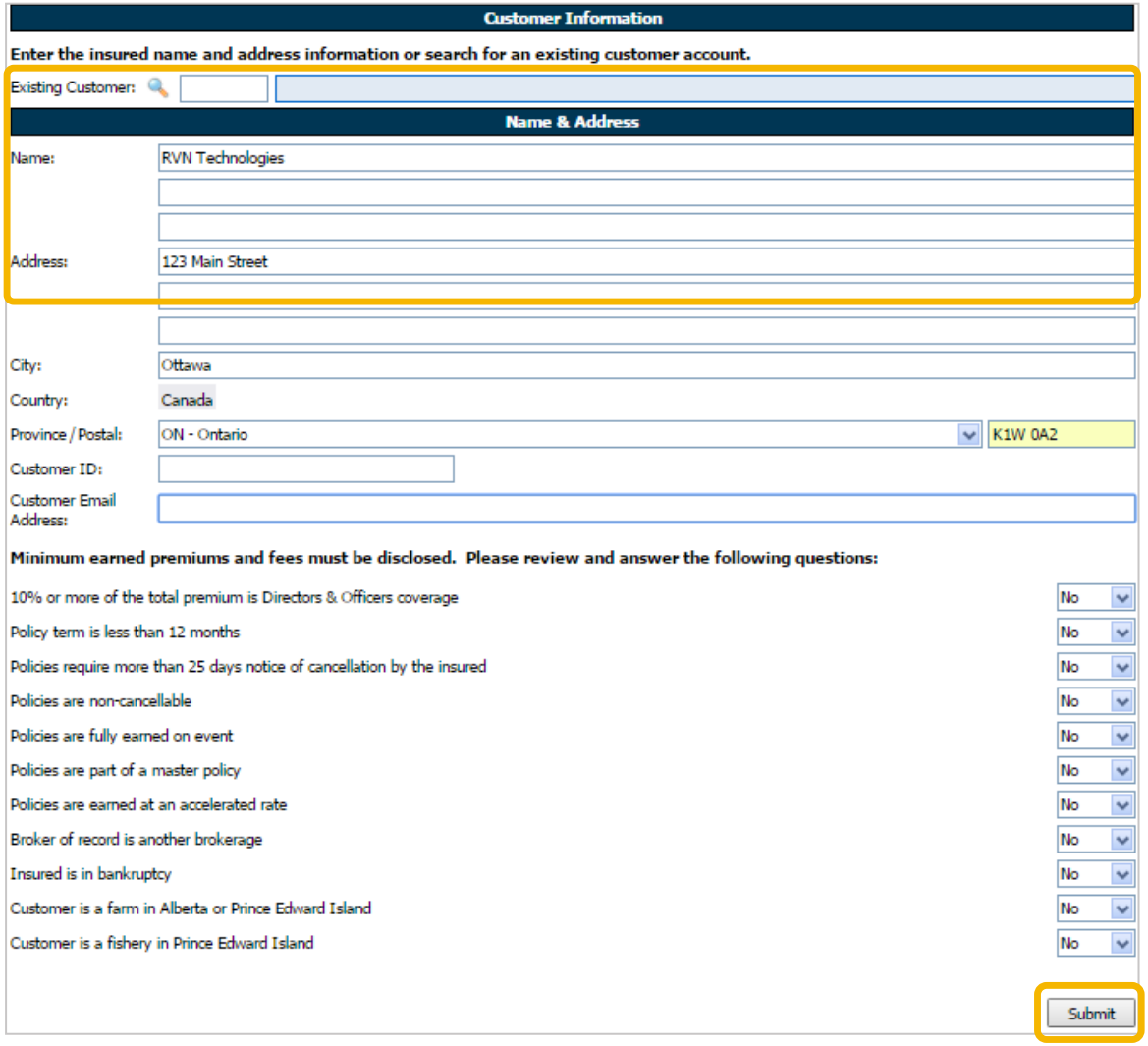
Or

b) **Payment Options** to create a quick quote, (A Payment Options Form you can send to your client now)



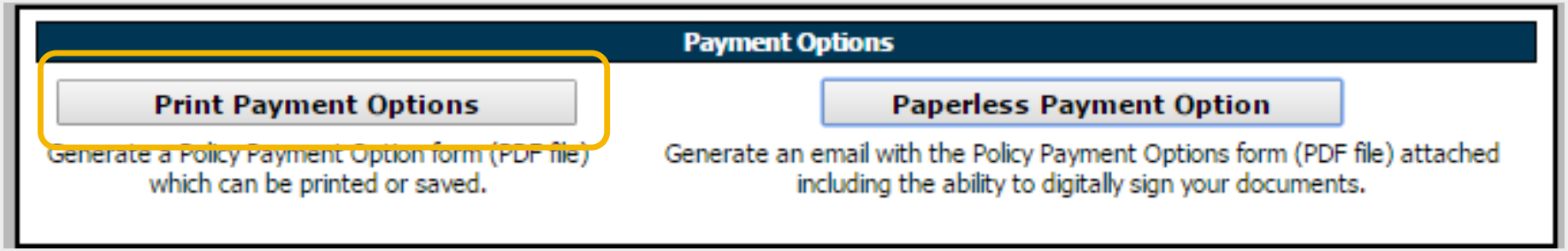
Quote Workflow

- Enter insured name and address
- Review underwriting questions and click **Submit**



Print Payment Options

- Select **Print Payment Options**



- Your **Policy Payment Options Form** is created and ready to present to your client

Invoice Payment Options

Policy Payments ID	P3236
Account No.	
Invoice Date	March 29, 2016
Balance Due	$21,600.00
Currency	$CAD

Insured: RVN Technologies
123 Main Street
Ottawa, ON K1W 0A2

Please return payment or signed form so as not to affect your coverage. Please mail to:

Best Insurance Brokers Inc.
4490 Second Street
Ottawa, ON K6H 3B7
Tel: 888 232 2238

A. Payment in full

Send cheque or money order for $21,600.00. Make all cheques payable to Best Insurance Brokers Inc.. Payment is due the effective date of the insurance coverage.

B. Credit Card

To complete your payment by credit card go to www.PolicyPayments.com/Best and enter ID: P3236 and follow directions on screen. An administration fee may apply.

C. Monthly Installments - PLEASE READ THE ATTACHED AGREEMENT AND SIGN WHERE INDICATED

TOTAL PREMIUMS INCL. TAX	DOWN PAYMENT	10 INSTALLMENTS OF	FINANCE CHARGE	FLAT RATE
$21,600.00	$3,672.00	$1,884.34	$915.40	4.238 %

To pay monthly please sign the attached agreement and attach a VOID cheque.
Please ensure any cheque issued for a down payment and/or past due installment is made payable to Best Insurance Brokers Inc..

Please provide your email and cell phone number. This information is only used to communicate with you regarding this payment plan.

Insured Email: _____

Insured cell phone #: _____

Attach VOID Cheque or complete below banking information:

Cheque Sample

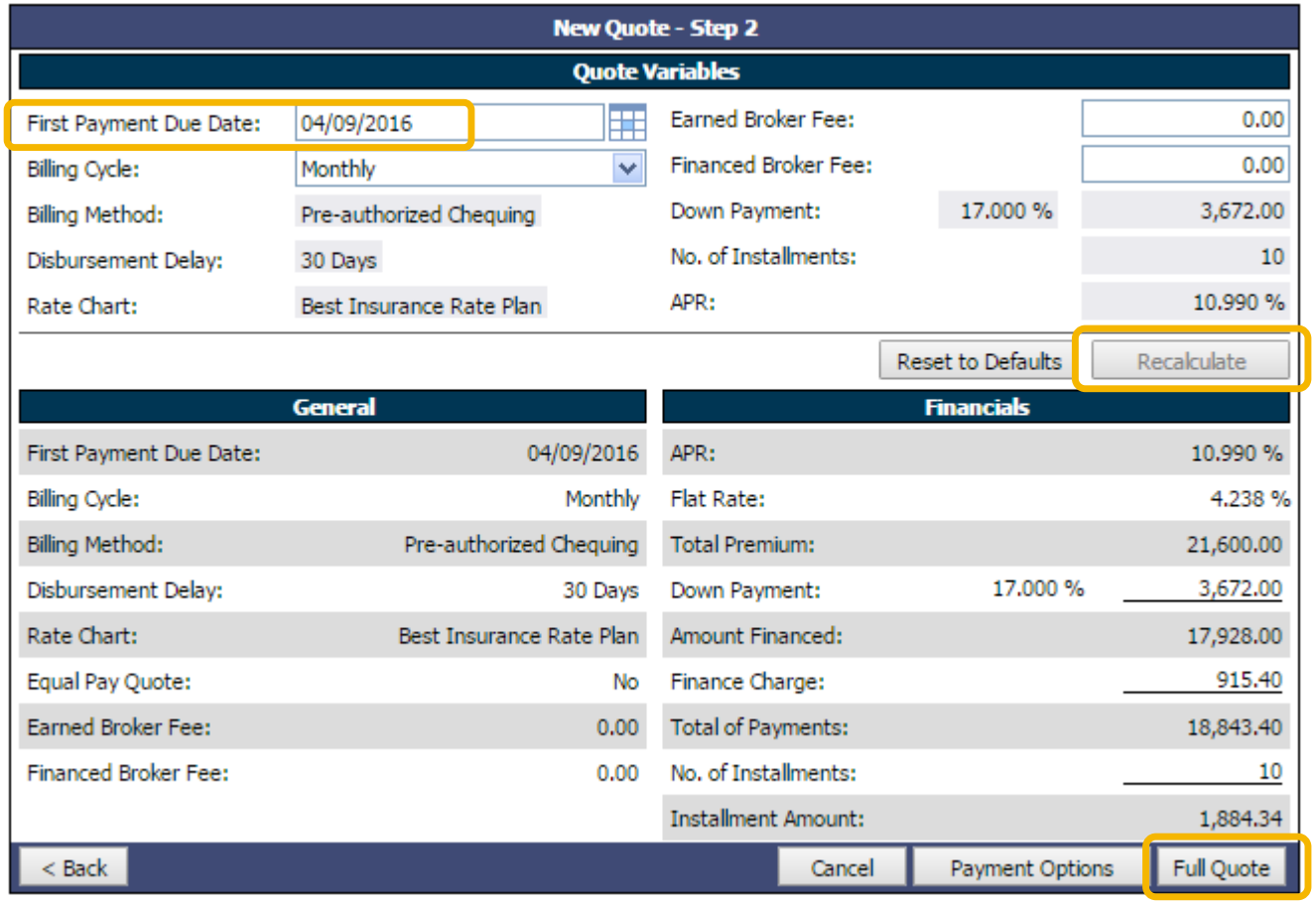
Bank Account Title (or name): _____

Financial Institution (Bank) Number (3 digits): _____

Branch (Transit) Number (5 digits): _____

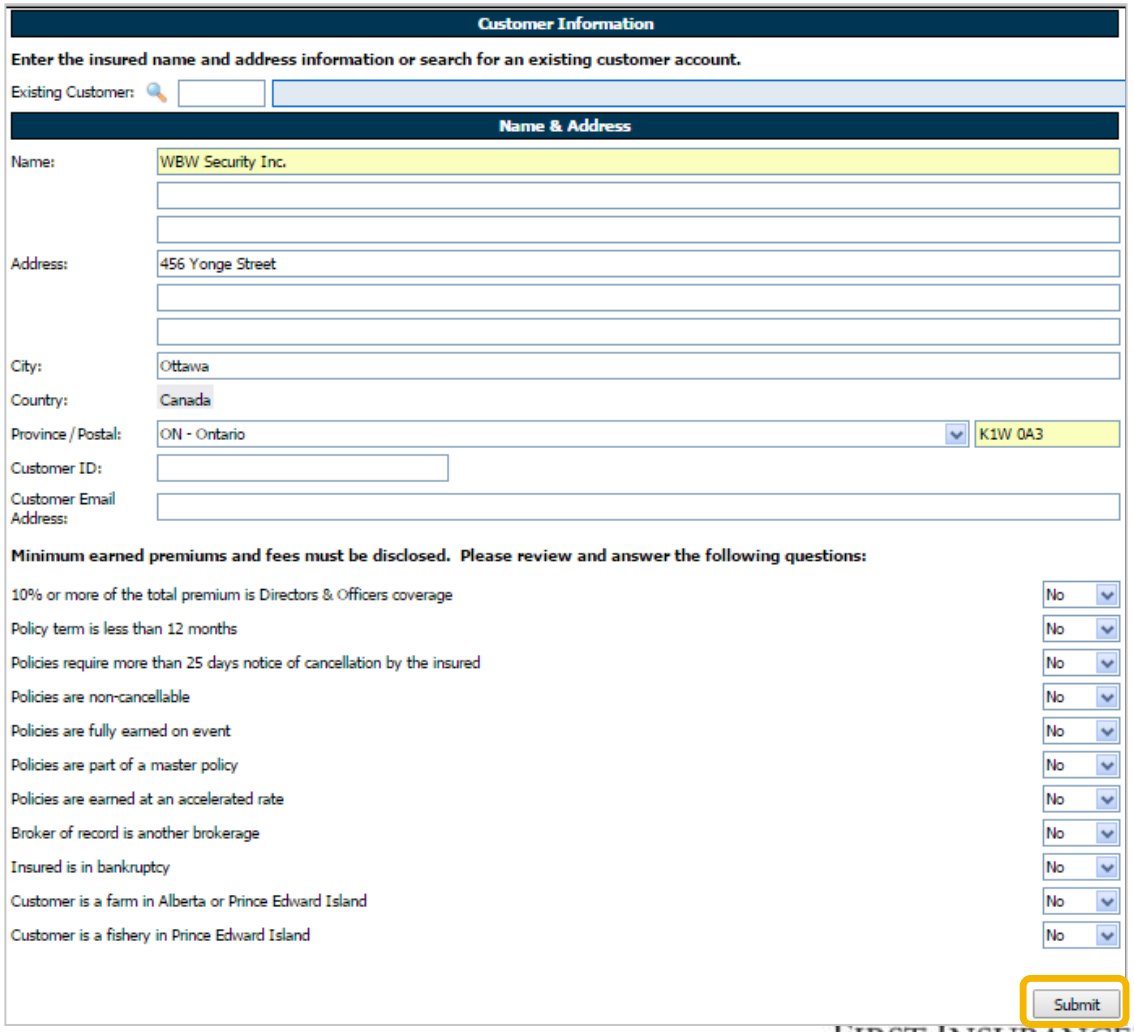
Bank Account Number: _____

- To add policy details to your quote chose **Full Quote**



Quote – Adding Policy Details

- Enter insured name and address
- Review underwriting questions and click **Submit**



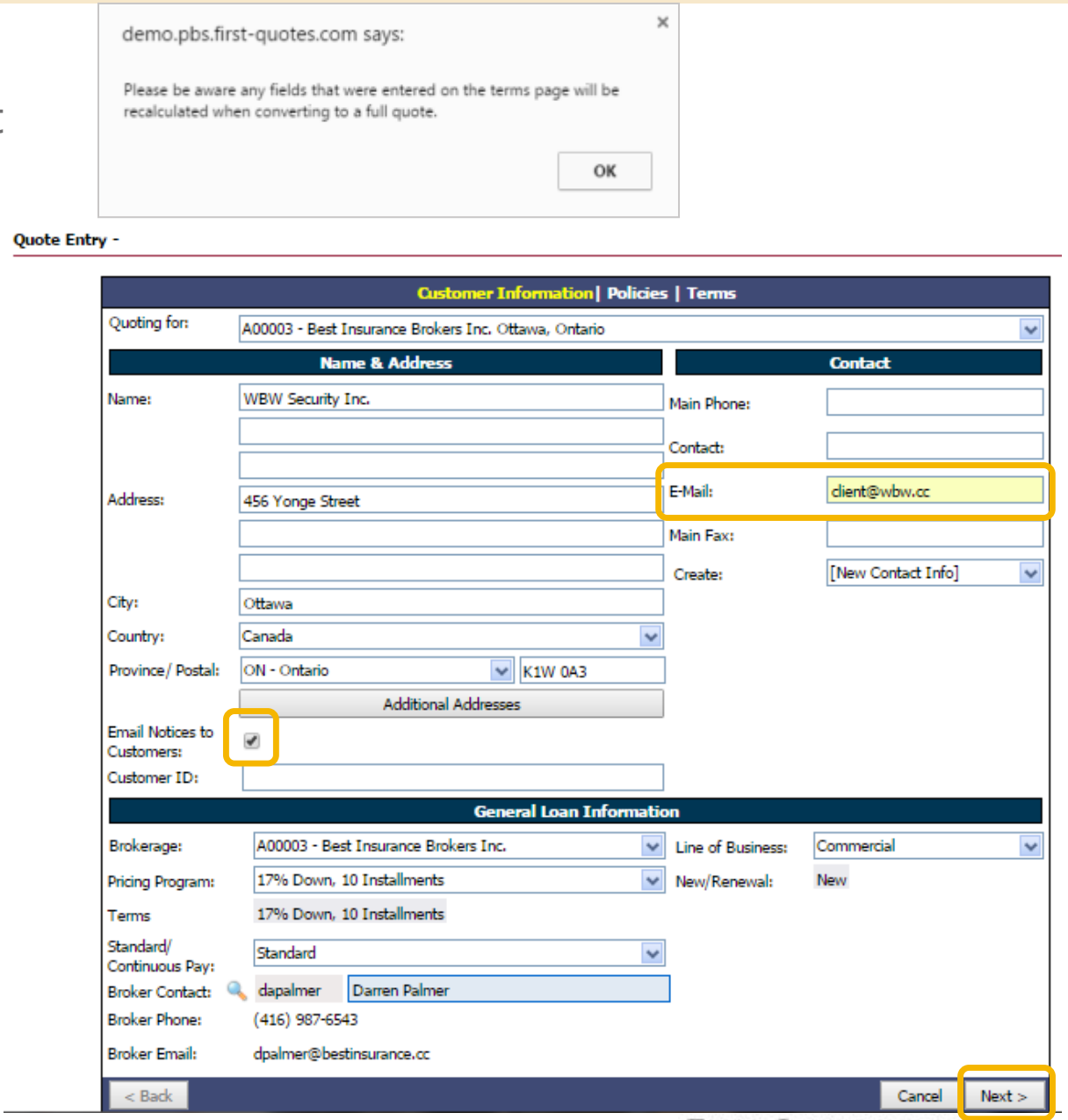
FIRST INSURANCE FUNDING OF CANADA
A WINTRUST COMPANY

- Pop up notifies that fields entered on terms page will be recalculated.

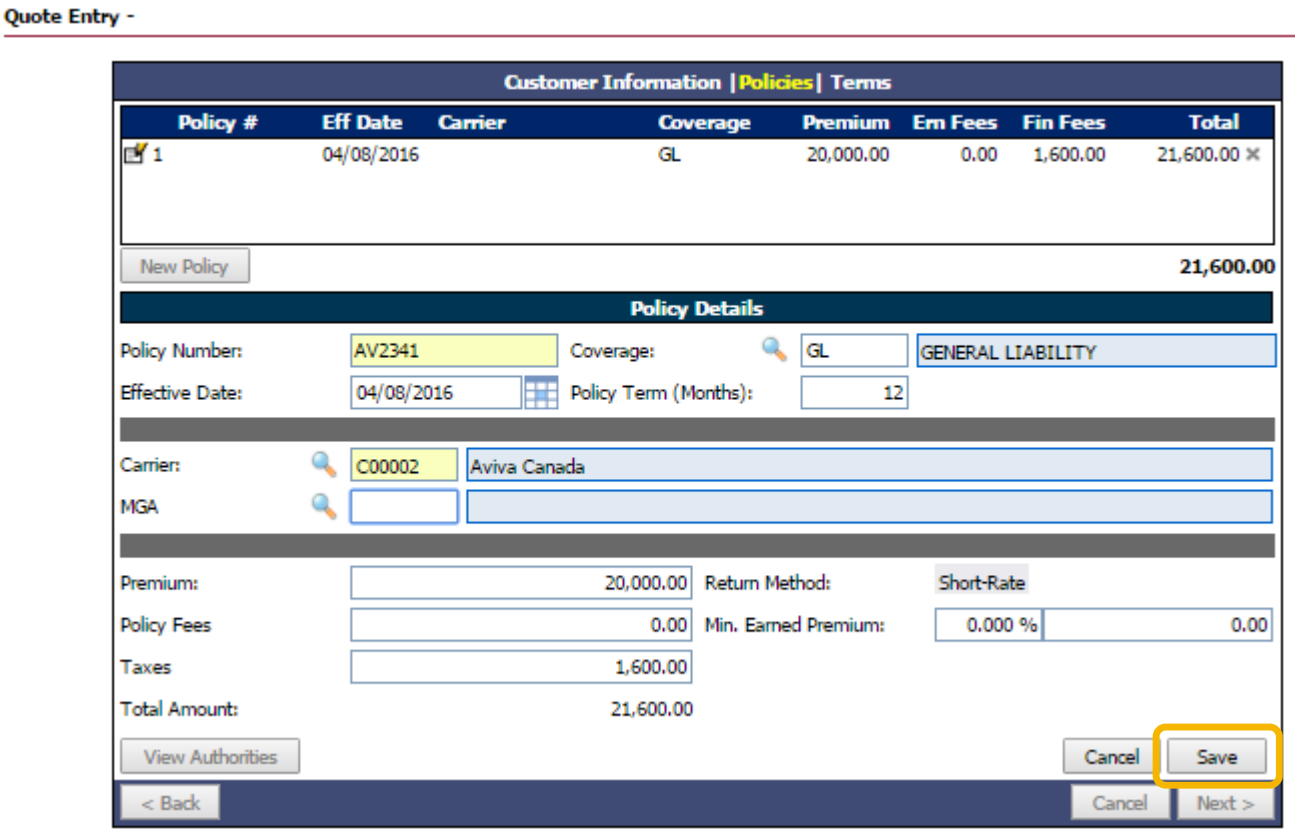
  Click **Ok**

- Review General Loan Information and click **Next**

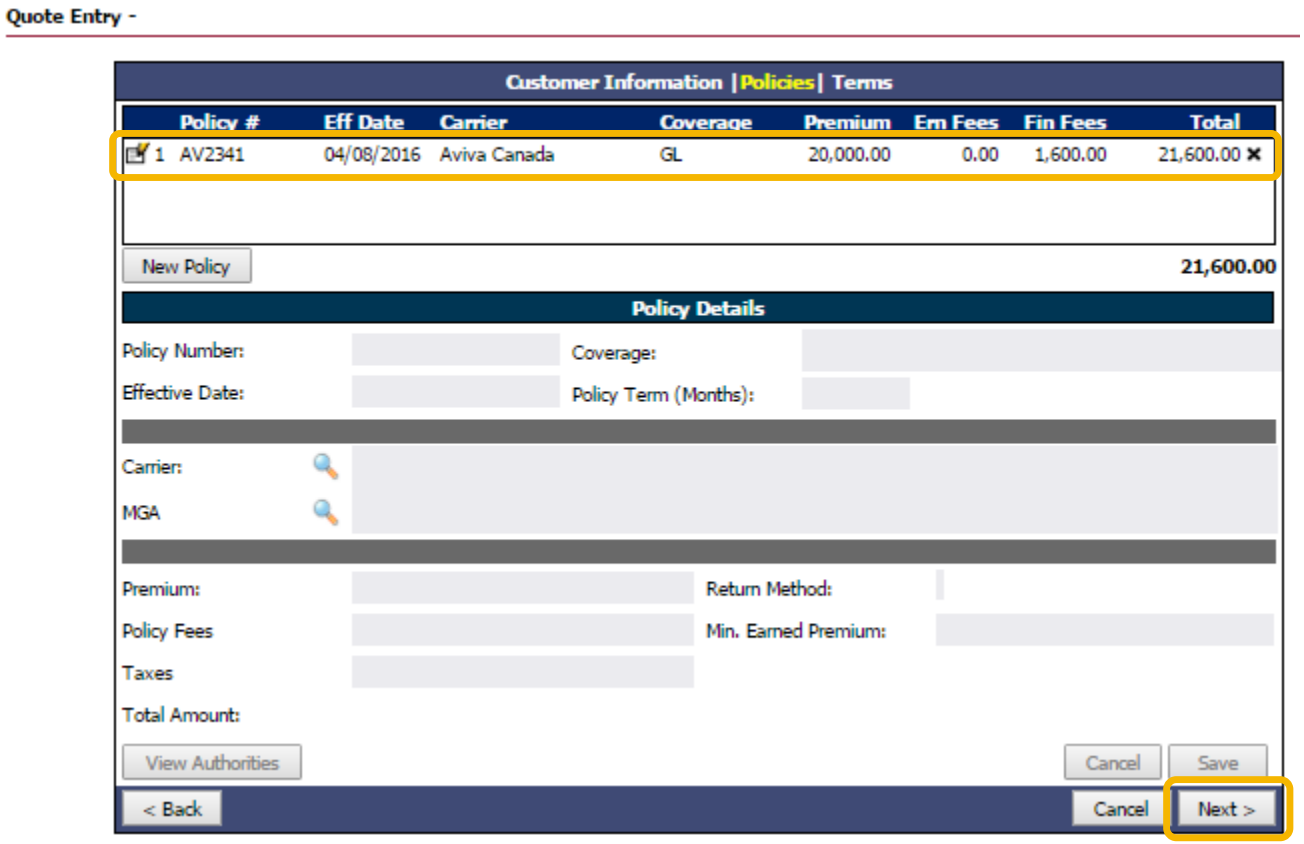
TIP: You can opt to send notifications to clients by email by clicking the check box and entering an email address



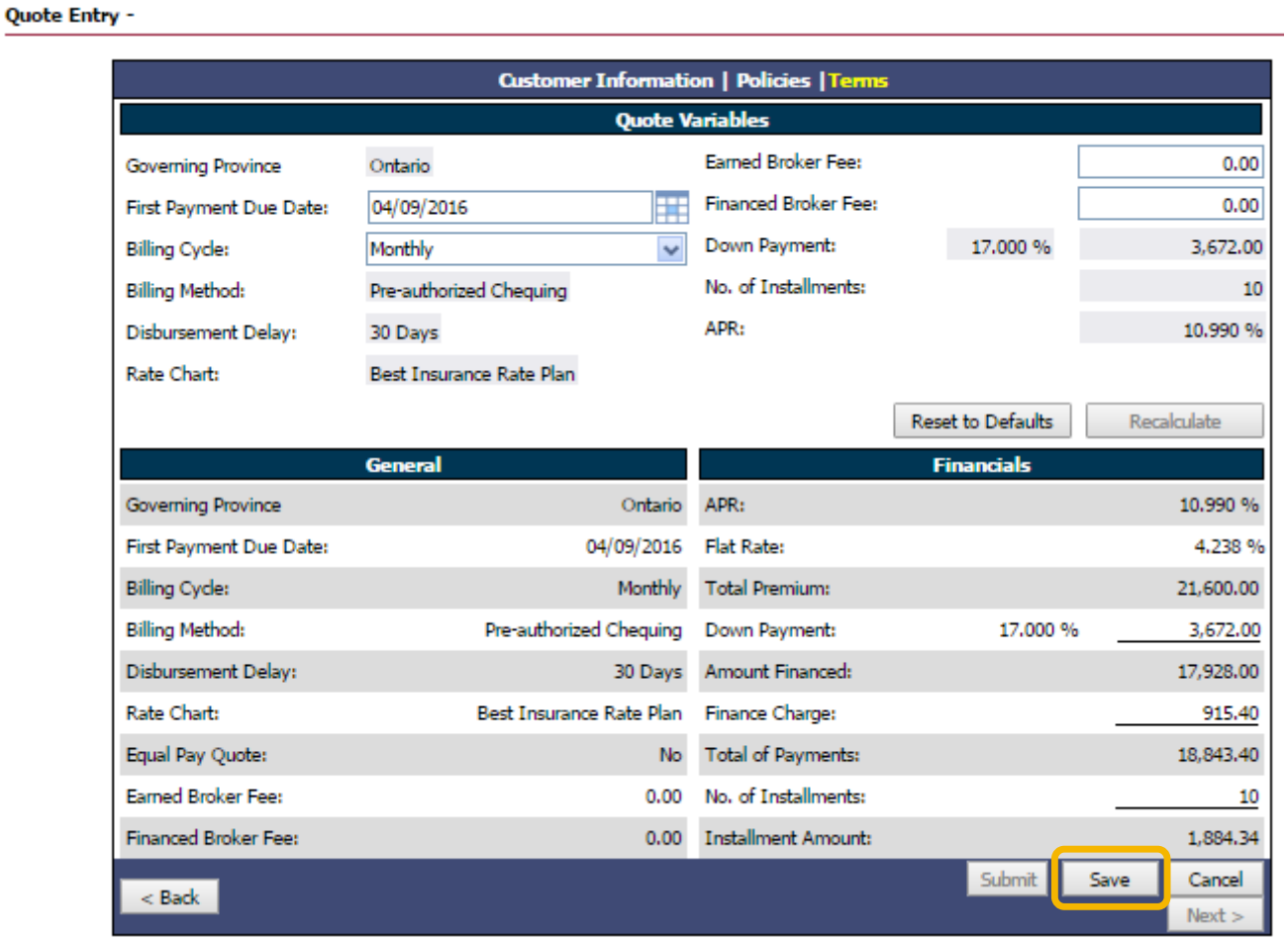
- Enter policy number, coverage type and effective date
- Enter carrier info and tab
- Review premium amount, fees and taxes and click **Save**



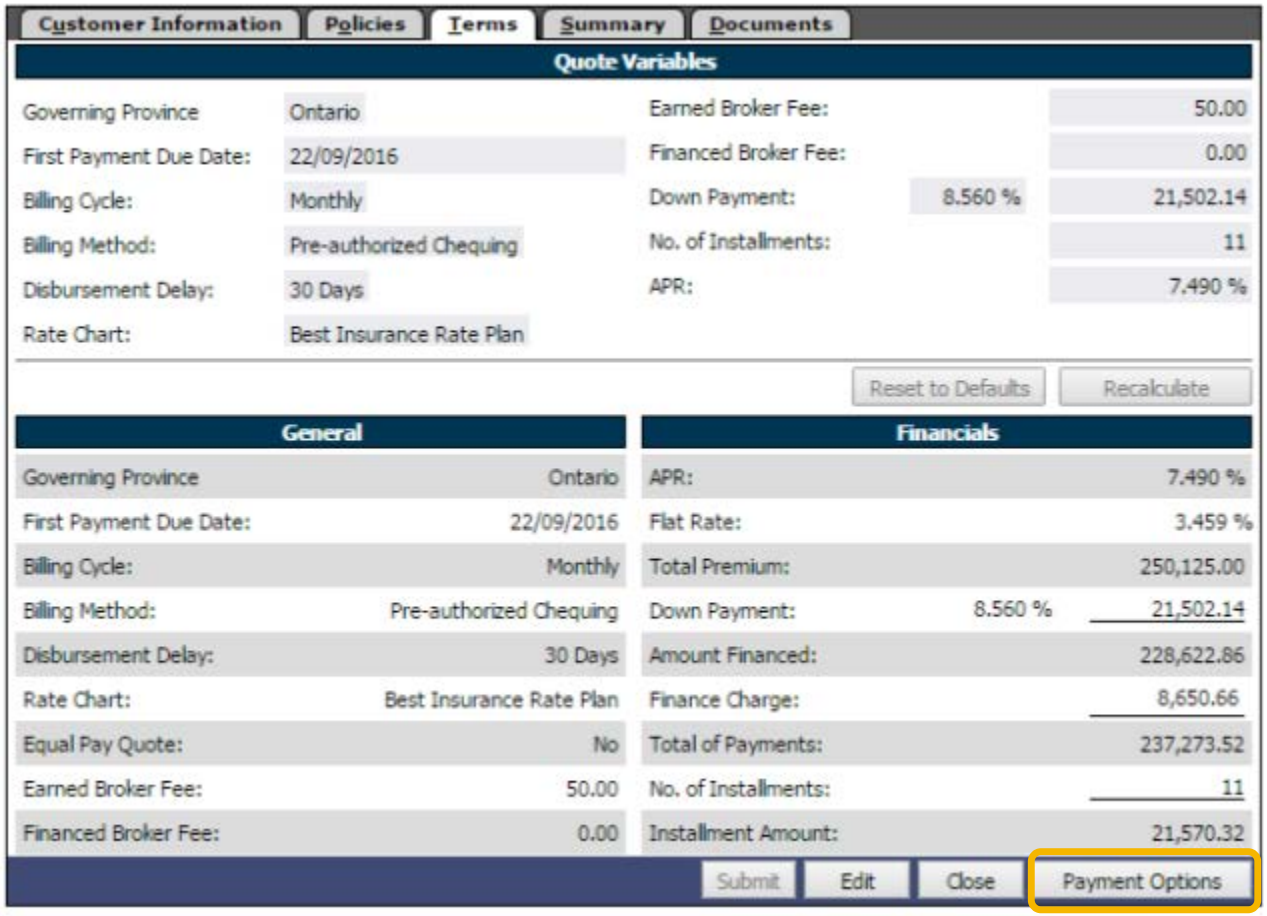
› Click **Next** to continue



› Review Financial info and click **Save**



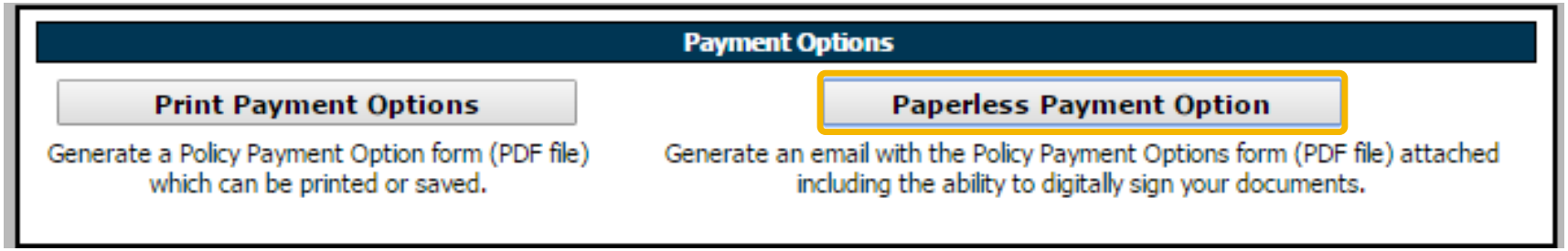
› Review info and click **Payment Options**



TIP: Cannot yet submit as customer details and banking info are required prior to submission

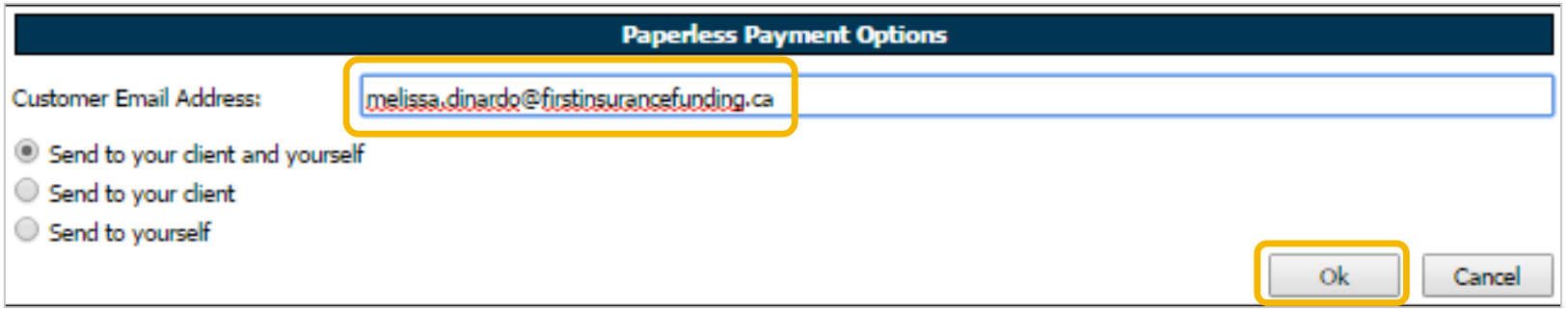
Paperless Payment Option

› Select **Paperless Payment Option** (eSignature)

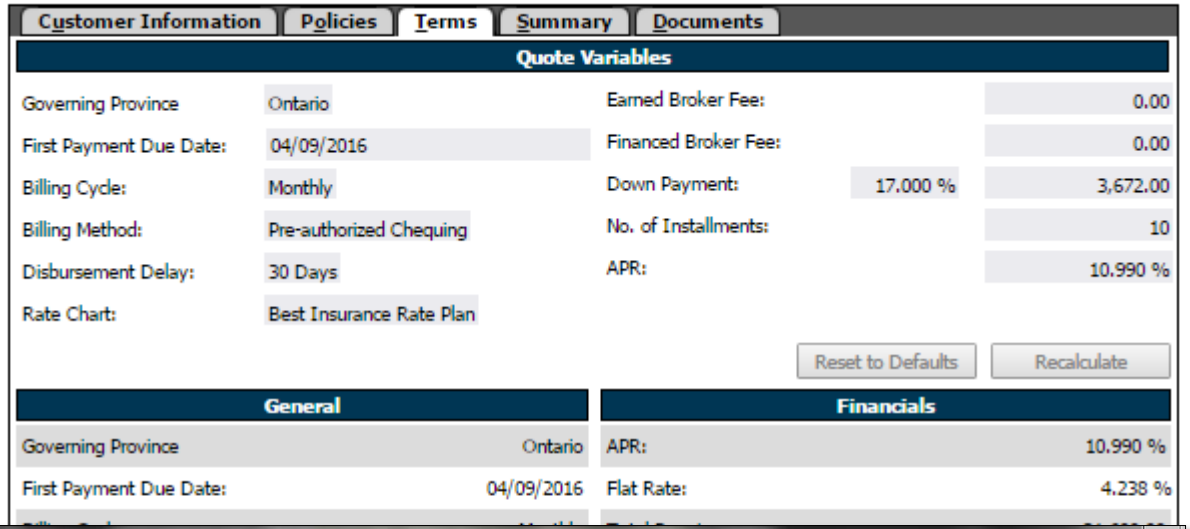


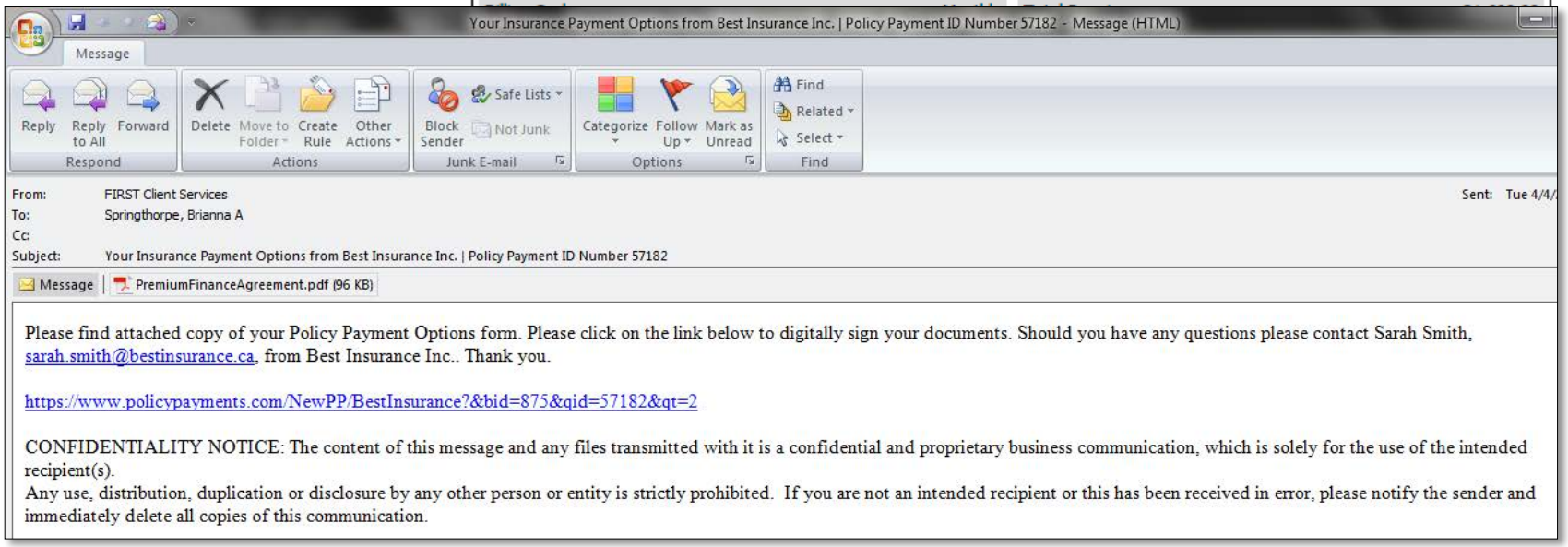
Paperless Payment Option

- Indicate email notification preference and type in customer email address**.** Click **OK** to proceed



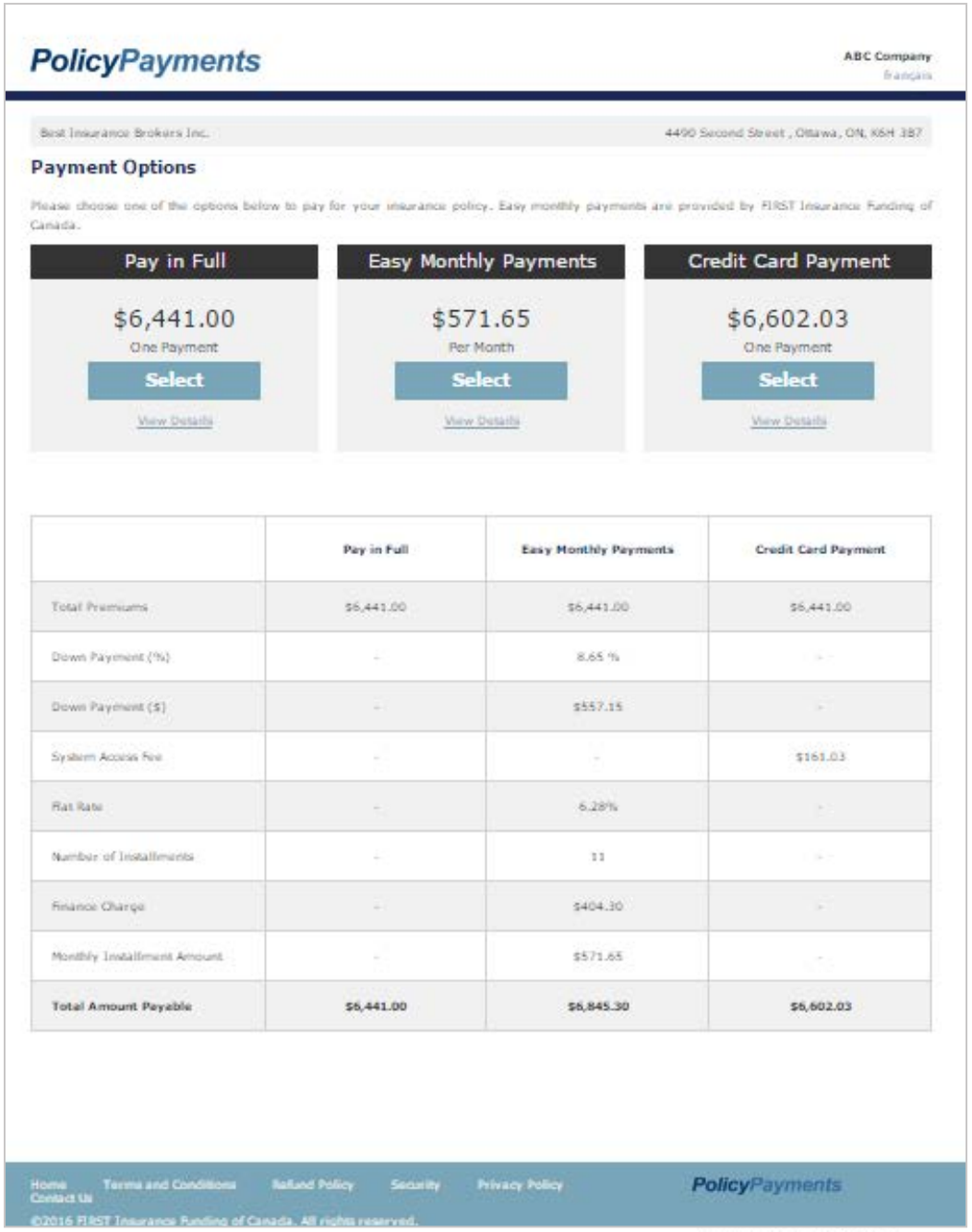
- You will be returned to the Terms screen
- An email with a link to PolicyPayments online with the PFA attached will be sent to the email(s) you selected





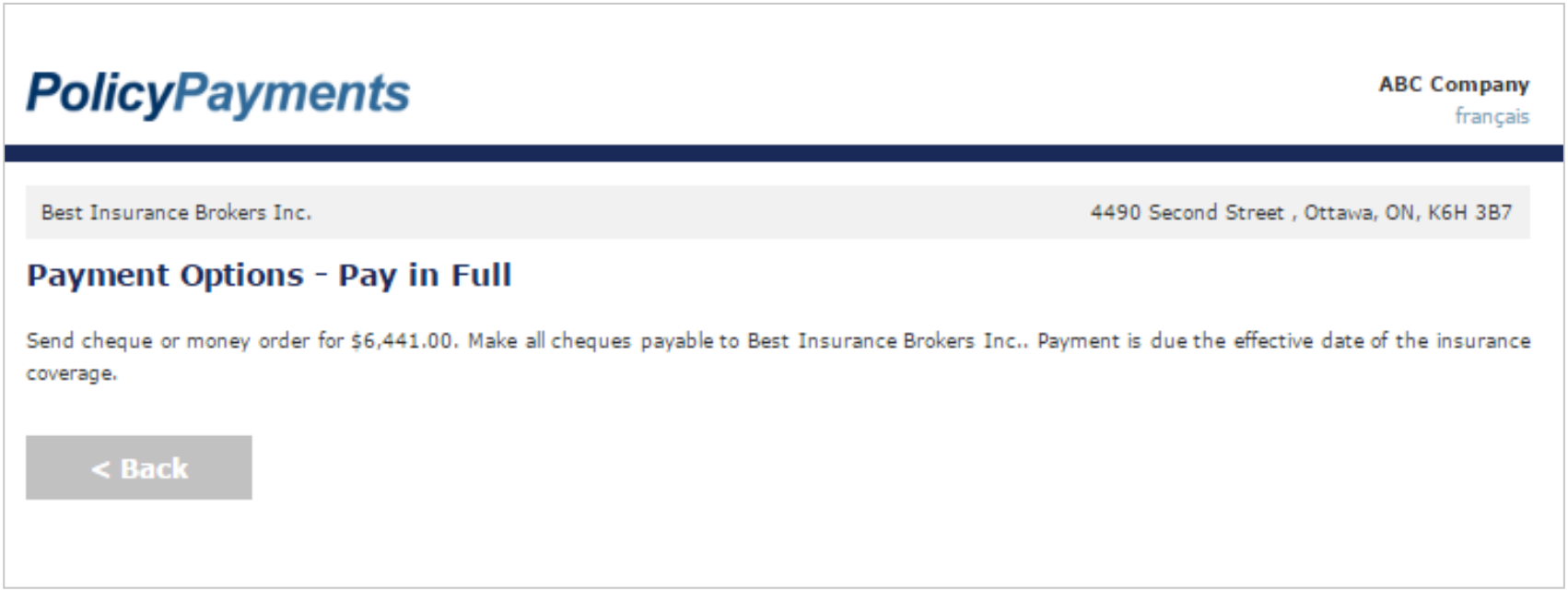
Paperless Payment Options

- Insured begins process by clicking on **link in email** and selecting desired payment option



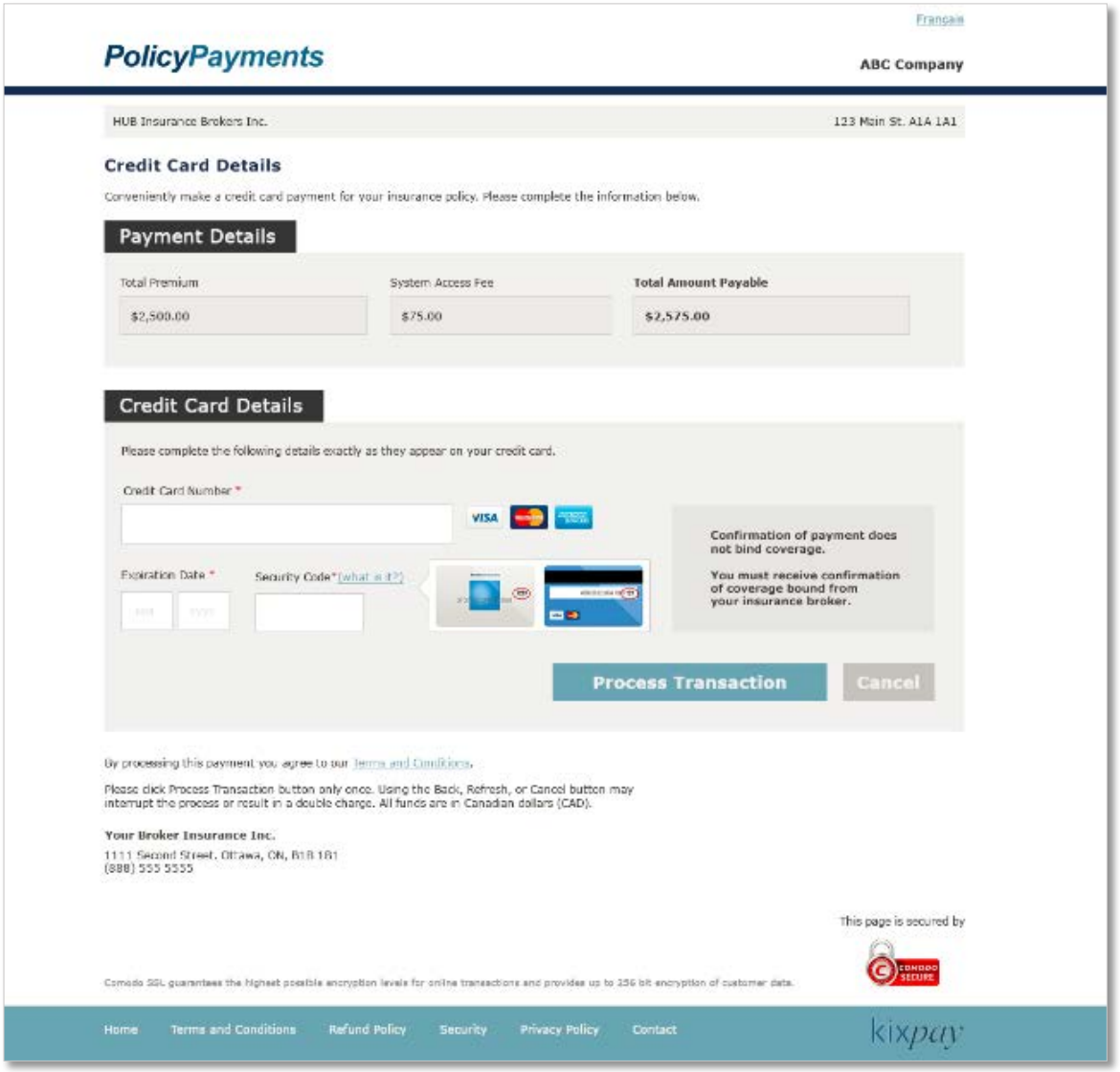
Pay in Full

- Upon selecting Pay in Full, directions will appear for insured to send payment to broker



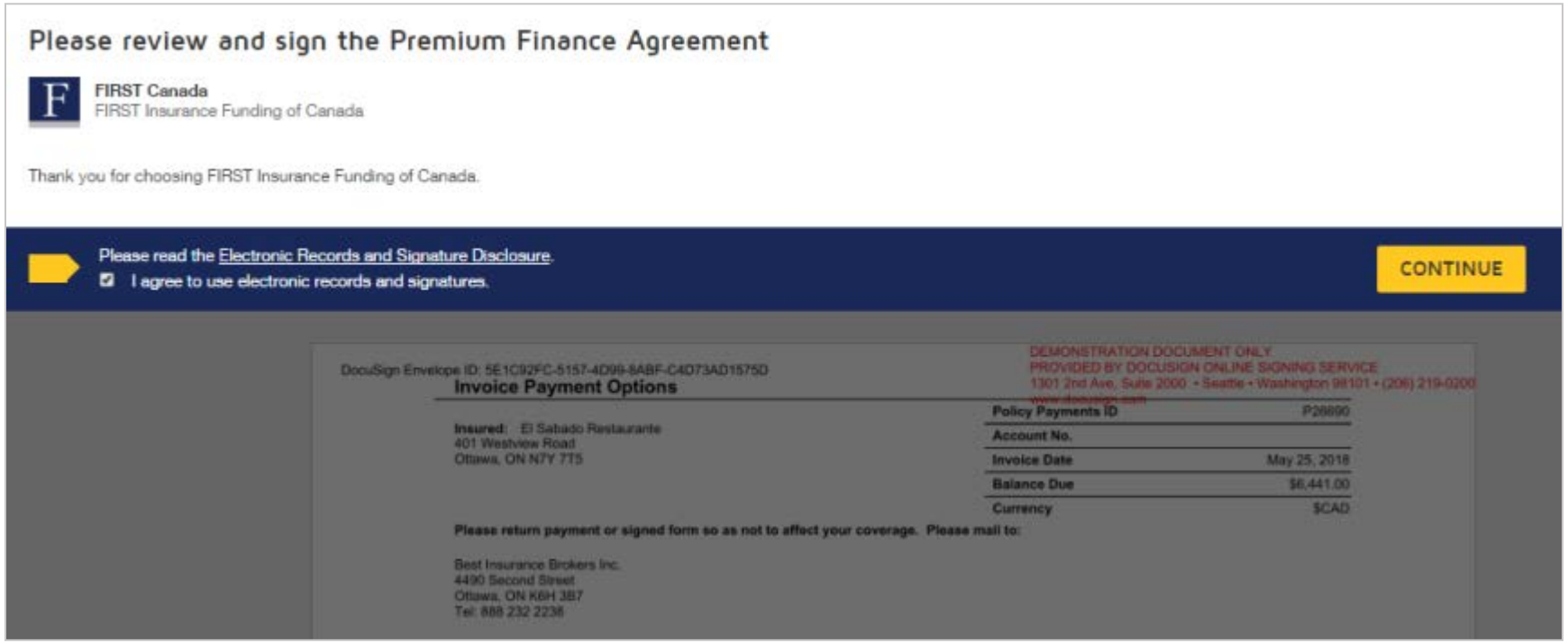
Credit Card

- Upon selecting Credit Card, insured will be directed to a self-serve credit card page to complete their payment



Monthly Payments

- Upon selecting Monthly Payments, insured will be directed to DocuSign to initiate eSignature

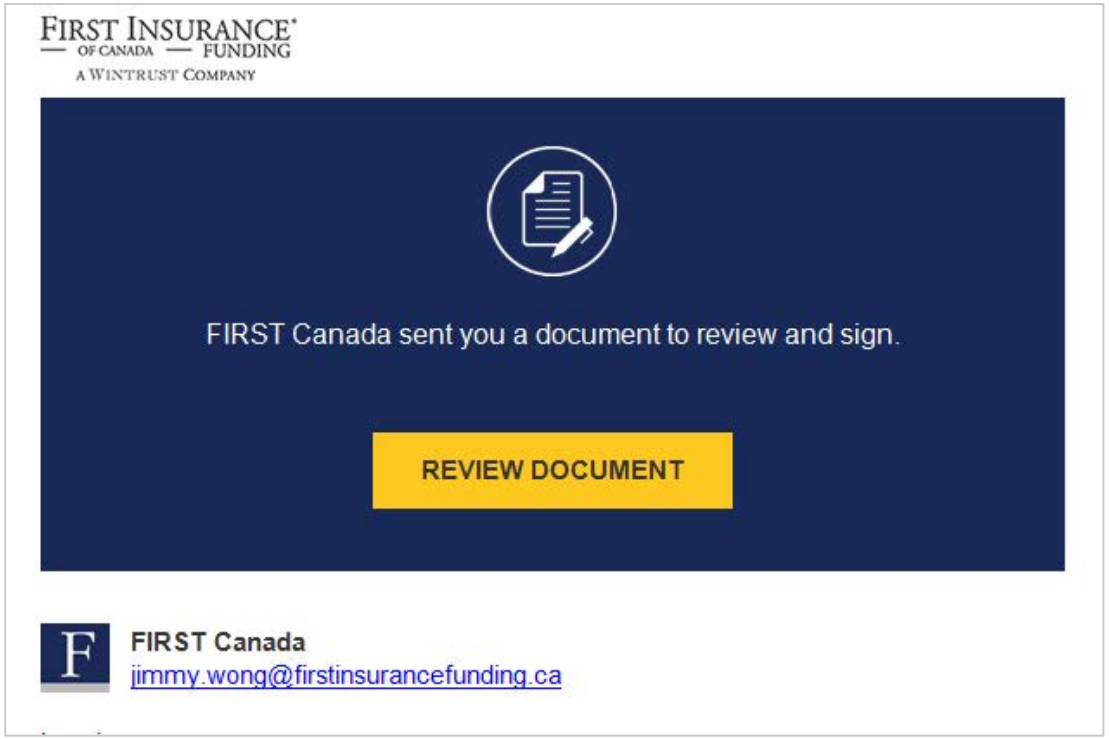


eSignature | Client Process

Broker Signature

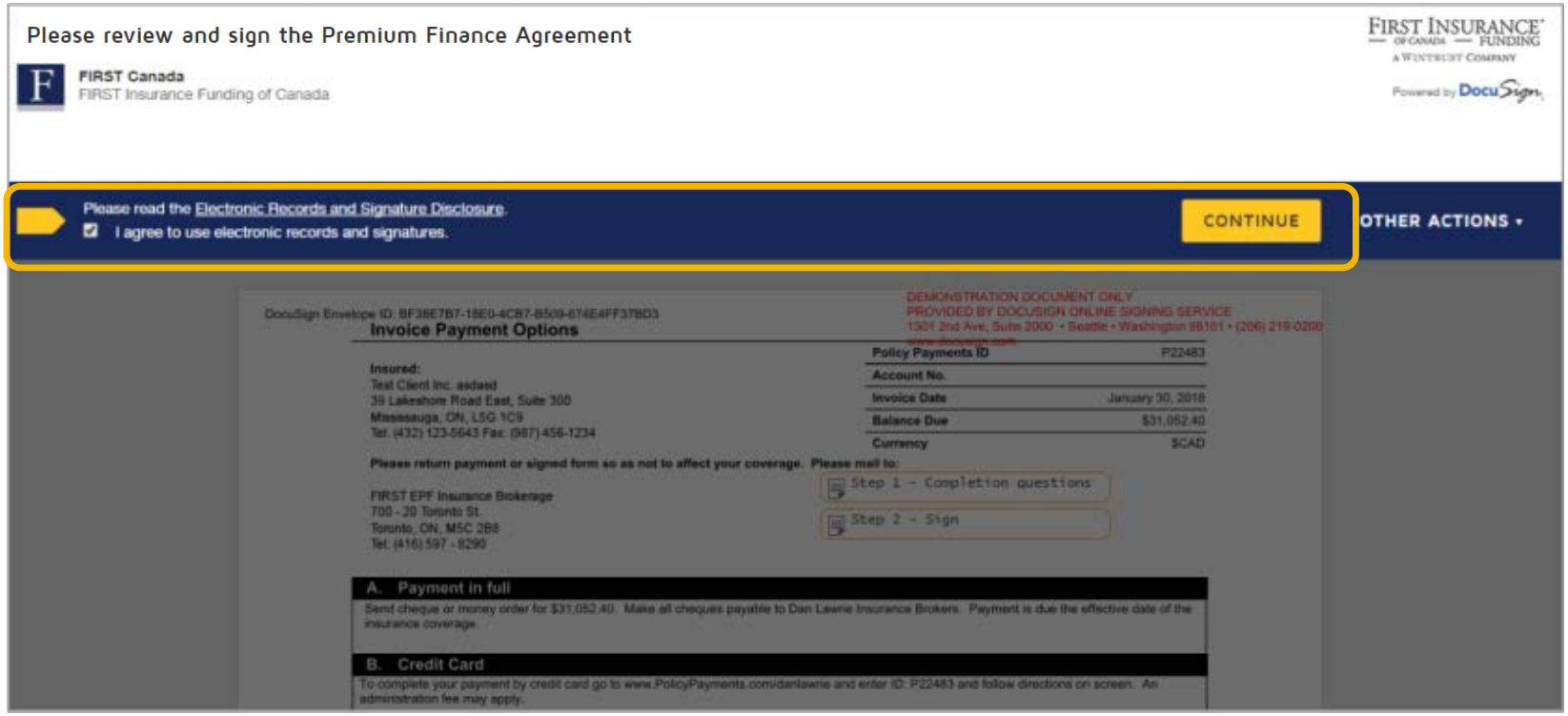
- Once insured signs the Premium Finance Agreement, you will receive an email to access the document and complete the process

- Click **Review Document** to proceed



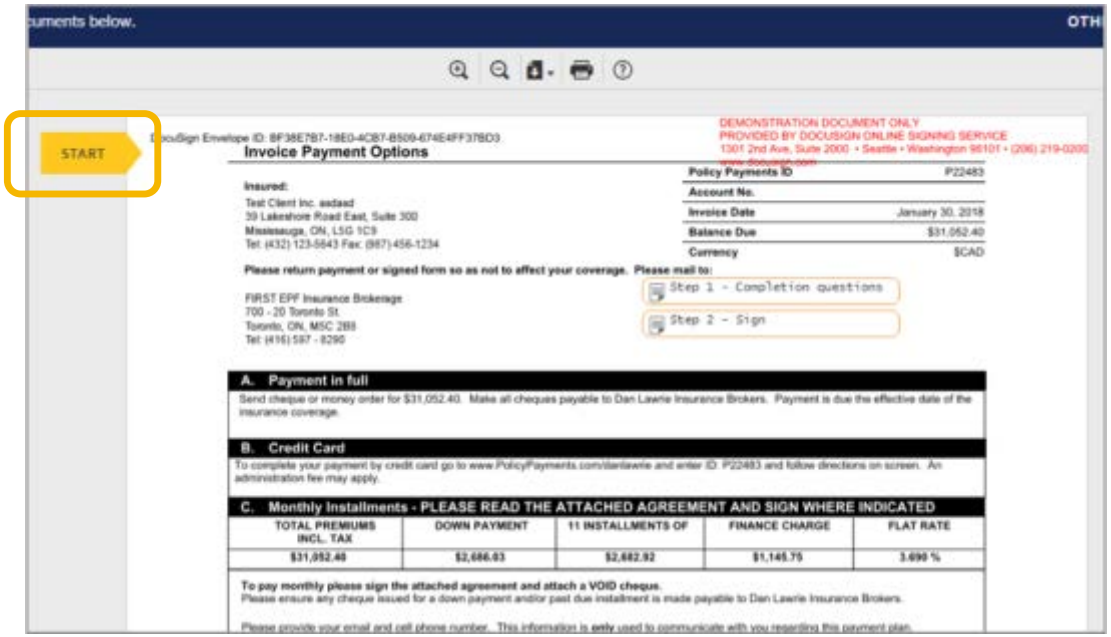
Broker Signature

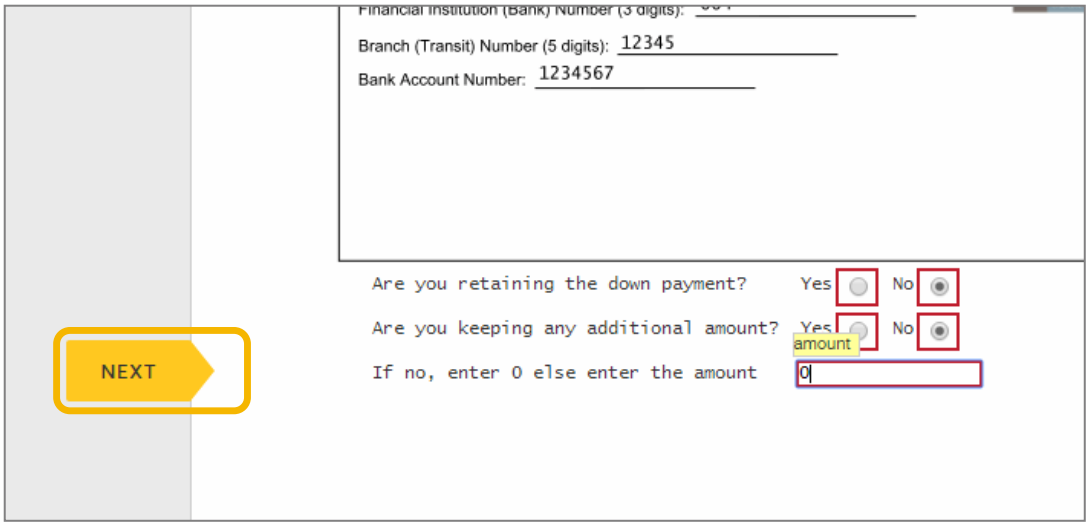
- Click to agree to terms (first time only) and click **Continue**

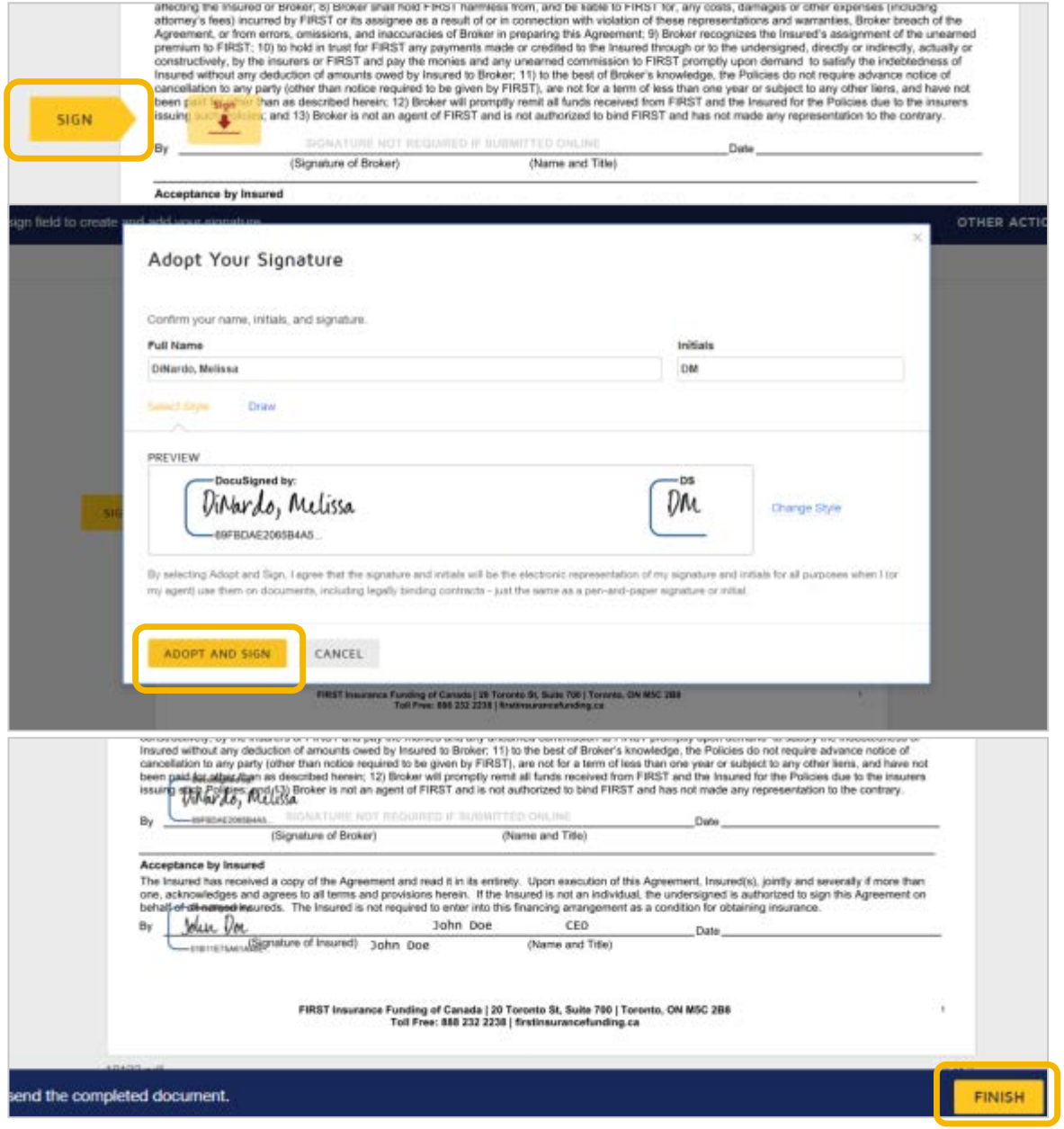


- A Payment Options Form will display, including the information entered by insured. Click **Start**

- Answer the Down Payment questions and click **Next**





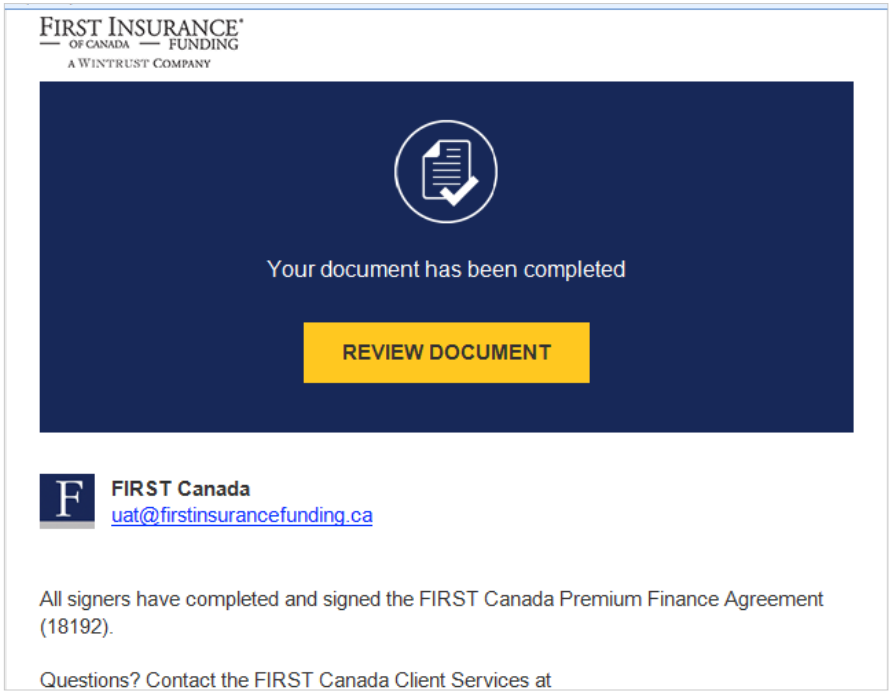


- Click **Sign**
- Review signature. Click **Adopt and Sign**
- Your signature appears in document. Click **Finish**

FIRST INSURANCE FUNDING OF CANADA
A WINTRUST COMPANY

Paperless Process Complete

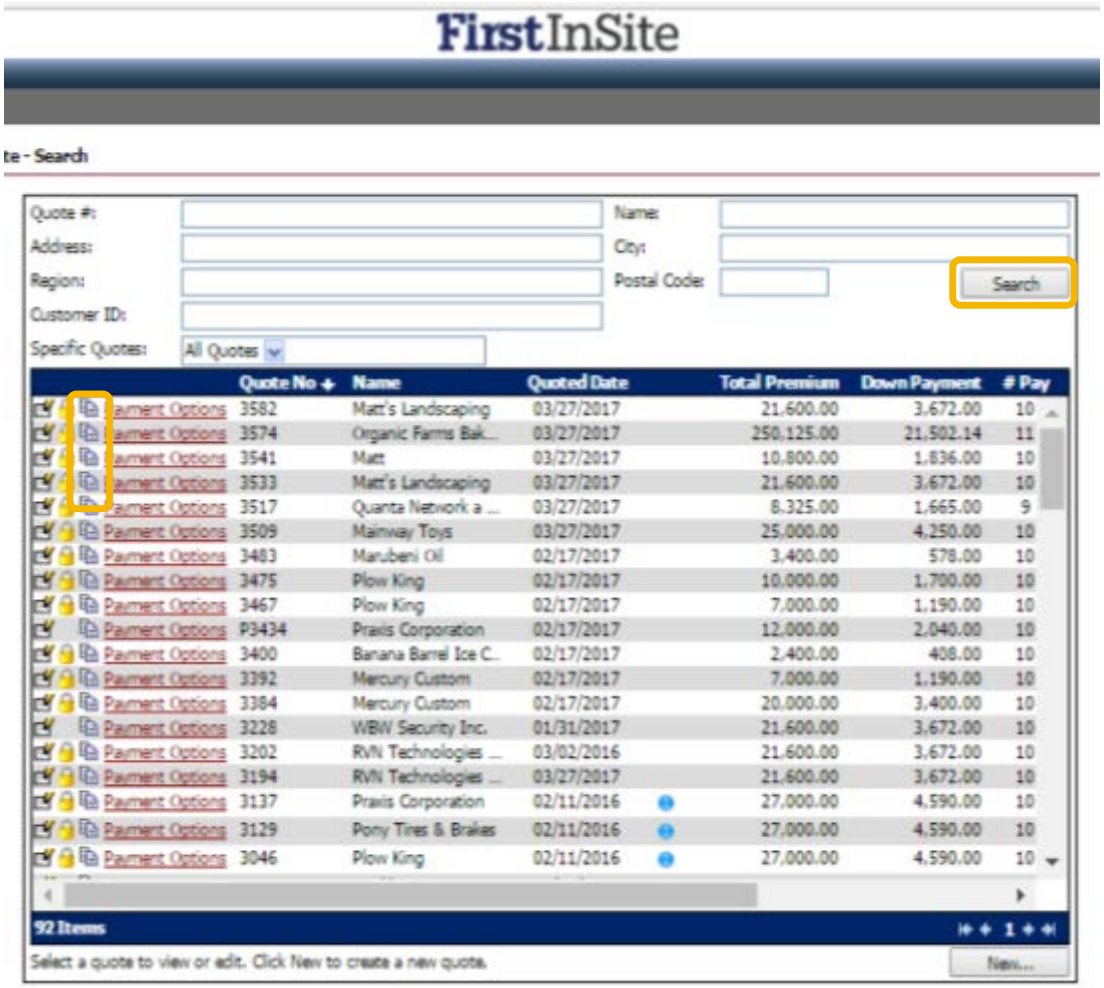
- Upon completion FIRST Canada will be automatically notified of the completed submission. NOAs will be sent to Broker and Client once the contract is processed.



No more printing, scanning, or emailing necessary with new paperless workflow

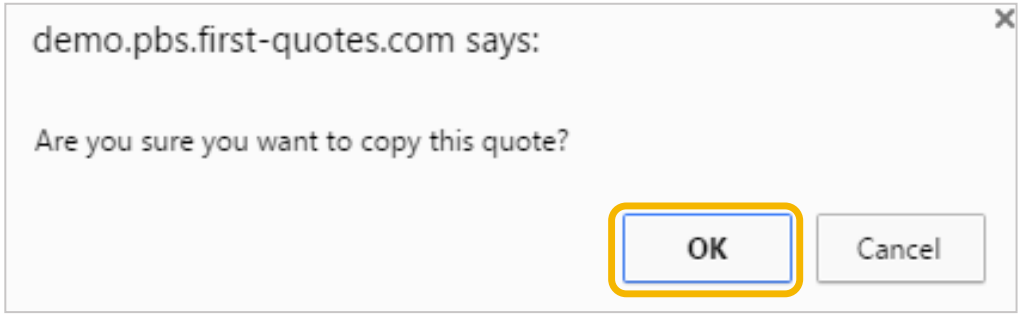
Editing a Quote

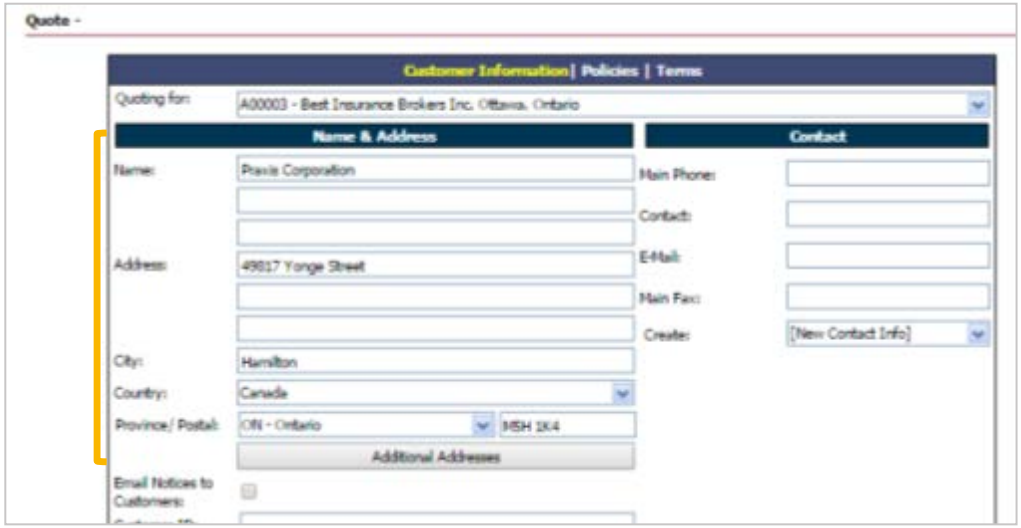
- You must duplicate a quote in order to create a version that can be edited
- Select Quote Search from the main screen
- Enter quote number or name and click **Search**
- Click on the double paper icon (copy quote)



Duplicate a Quote

- Upon clicking copy, a pop up notification appears. Click **OK**
- Edit information as necessary and follow previous steps to complete the quote

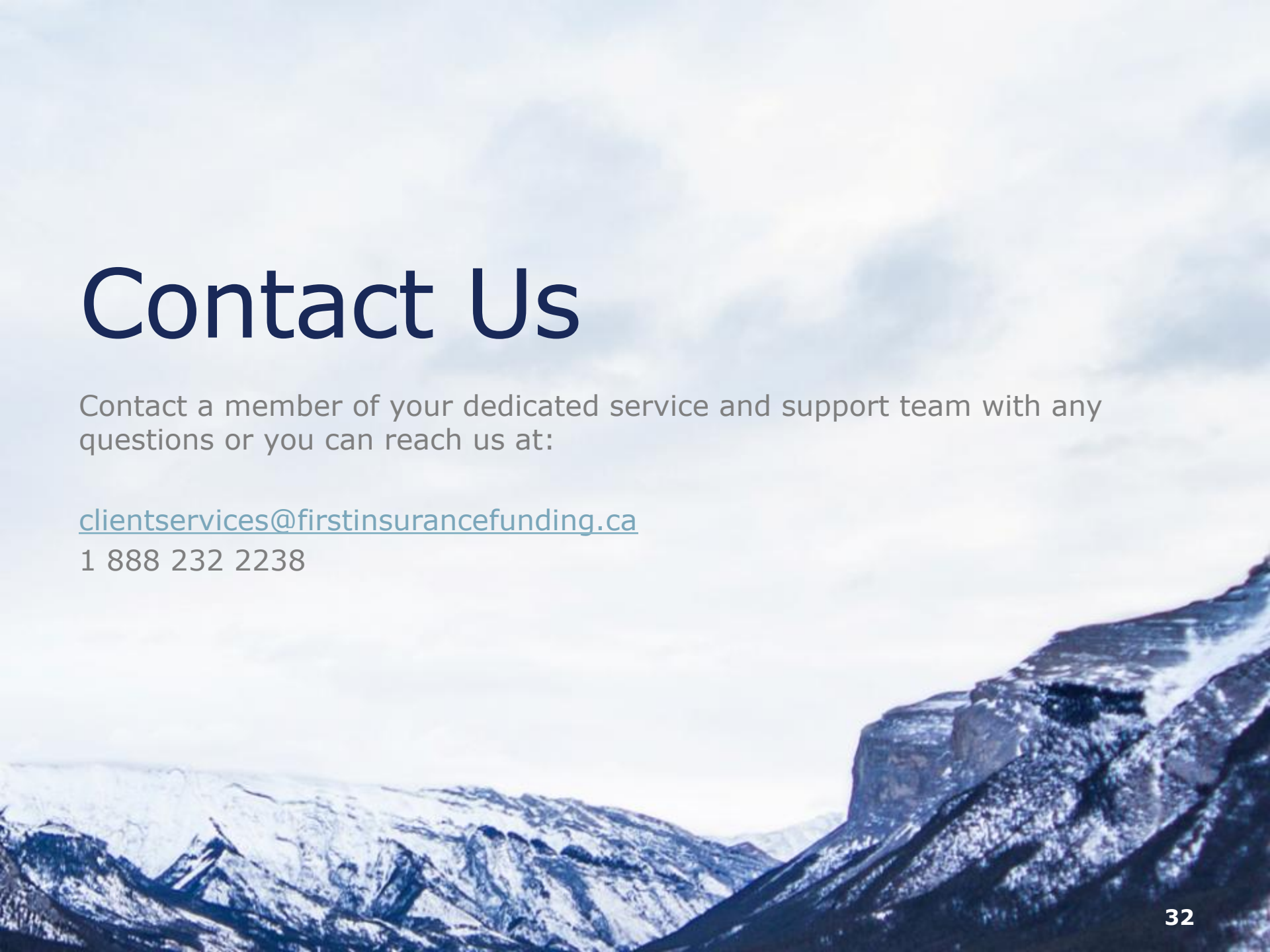




Tips

1. Your login is now your email address
2. Login credentials will be emailed to you within 5 business days from training.
3. Access to old quoting system for existing loan management only
    - endorsements, funding inquiries, notices, etc.
4. Renewals will be available in the new system
5. Training guides, videos, FAQs, webinars available on our website – Visit First InSite Enhanced tab

Contact Us

Contact a member of your dedicated service and support team with any questions or you can reach us at:

clientservices@firstinsurancefunding.ca
1 888 232 2238